TRAVEL PRINTOUT

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TRAVEL INDUSTRY BENEFITS FROM ECONOMIC RECOVERY

Despite a disappointing summer vacation travel season in many parts of the country, travel industry receipts posted significant growth over 1983 during the first half of this year, Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, told the tenth annual Travel Outlook Forum in Dallas, Texas, on September 14.

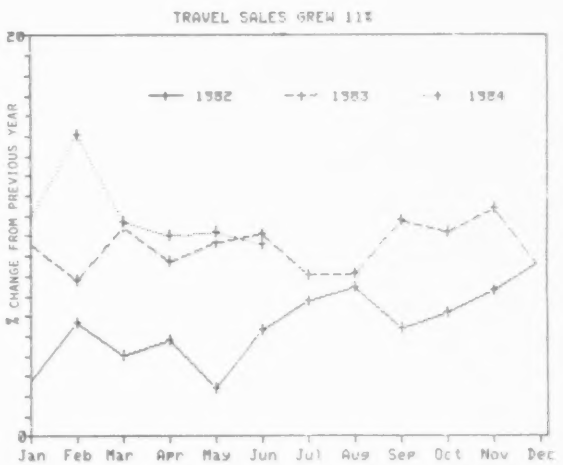
According to Frechtling, travel industry receipts in the first half of 1984 rose nearly 11 percent over year-earlier figures, a rate of growth almost 20 percent greater than that registered in 1983.

Frechtling reported domestic airline receipts increased 17 percent in the first half, their highest rate of growth in four years, leading all travel industry sectors. Although eating and drinking place sales rose at a rate of 9 percent for the same period, slower than 1983's 10.5 percent, hotel/ motel receipts rose over 13 percent, outpacing any yearly increase since 1980.

In the intercity passenger transportation sector, Amtrak has posted the largest percentage growth in passenger-miles: up 11.1 percent, the best performance since 1979. Intercity travel by personal automobile, truck or recreation vehicle has grown an encouraging 6 percent, the greatest rise in at least 10 years. "Declining gasoline prices and improved fuel efficiency are no doubt contributing to this healthy picture," Frechtling noted.

However, despite the improvement in industry receipts the domestic travel market has not expanded in real terms as anticipated in this strong economic recovery, Frechtling's analysis shows.

According to the 1984 National Travel Survey, the U.S. Travel Data Center's monthly telephone survey, U.S. resident travel during first-half 1984 fell 4 percent from the previous year, to 423 million person-trips (one person traveling 100 miles or more away from home on one trip), suggesting some deterioration from the 1 percent decline for full year 1983. 1984 marks the third consecutive year that total U.S. person-trips have fallen.



Frechtling commented, "The first half of 1984 produced a lackluster domestic travel market, growing more slowly than the overall economy in real terms and producing employment growth outpaced by other major industries. While much of the travel industry recognized that

(Continued on page 3)

TRAVEL PRICES RISE MODERATELY IN AUGUST

Increases in intercity bus fares, lodging and airline fares boosted the cost of travel in the U.S., as measured by the U.S. Travel Data Center's Travel Price Index (TPI), 1.1 percent in July, the largest increase in three months.

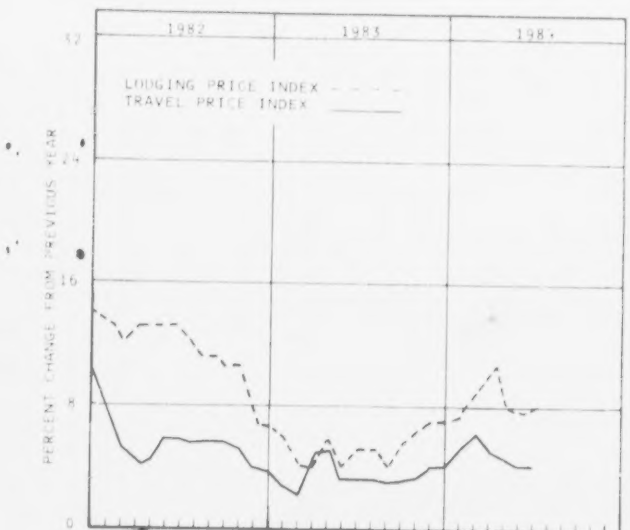
For comparison, the Consumer Price Index (CPI) rose only 0.3 percent on a seasonally unadjusted basis in July 1984, the same rate of increase for the third consecutive month.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, stood at 367.3 in July (1967=100).

Intercity bus fares climbed 3.0 percent to lead all TPI components, followed by a 2.1 percent increase in the cost of lodging while out of town. Airline fares rose 1.8 percent.

On the other hand, gasoline prices dropped 1.4 percent from June's level, and the cost of incidental purchases and intercity train fares remained virtually unchanged from the previous month.

The TPI has increased 4.2 percent since July of last year, nearly the same as the 4.1 percent increase in the CPI. Intercity bus fares grew 8.6 percent to lead all components during this period, followed by an 8.1 percent increase in lodging costs. Gasoline prices, however, are 5.0 percent lower than one year ago. ##



LODGING PRICE INCREASES CONTINUE TO EXCEED THOSE OF OVERALL INDEX

Monthly and Annual Rates of Change in the Travel Price Index and Components
July, 1984

TPI Component	Monthly Percent Change June, 1984 to July, 1984	Annual Percent Change July, 1983 to July, 1984
Transportation	0.4	1.7
Airline Fares	1.8	7.5
Intercity Bus Fares	3.0	8.6
Intercity Train Fares	0.1	5.7
Taxicab Fares	0.2	3.1
Gasoline	-1.4	-5.0
Lodging	2.1	8.1
Food Away From Home	0.4	4.6
Entertainment Services	1.6	5.3
Incidentals	*	1.9
TRAVEL PRICE INDEX	1.1	4.2
CONSUMER PRICE INDEX	0.3	4.1

* Less than 0.05 percent

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

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TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $45 per year, U.S., Canada and Mexico; other foreign countries, $55 per year, payable in U.S. funds only.

JUNE TRAVEL DIPS SLIGHTLY

A large increase in vacation travel in June nearly offset falling business/convention travel to produce an overall travel decline of less than one percent, according to the U.S. Travel Data Center's latest National Travel Survey results.

The total number of person-trips fell from 117.2 million in June 1983 to 116.5, following an 8 percent gain in overall travel in May. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel in June 1984 grew 16 percent over the previous year, most of the growth attributable to a sharp increase in vacation travel outside the contiguous United States.

Travel for "other pleasure" posted a 2.6 percent increase over last year, while weekend person-trips fell 12.9 percent for the same period, marking twelve months of continuous decline.

Person-trips by air increased for the fourth consecutive month, while those by auto/truck/RV travel fell 1.0 percent from June 1983.

Although average trip distance fell from 960 miles in June 1983 to 800 miles this June, trip duration remained the same, with Americans spending an average of 5.5 nights away from home. Families with $30,000 or more of annual income increased their travel by 7 percent, and comprised 46 percent of total travel for June.

Travel both to and from the Great Lakes Country posted the largest increase in June from 1983 levels, due to the region's relatively strong economic recovery. Travel to The South was up 9.1 percent, while travel to the Northeast rose 14.6 percent.

The survey also showed total travel intentions for the next six months fell 3 percent from June 1983. ##

(CONTINUED FROM PAGE 1)

pent-up demand for consumer durables and strong dollar exchange rates would restrain domestic travel activity for a time in the new recovery, none of us anticipated the transition back to 'normal' consumption patterns would last so long."

Frechtling's "Travel Trends in 1984", with tables and charts, will be sent to full members and will be updated in the 200-page proceedings of the 1985 Travel Outlook Forum, the 1985 Outlook for Travel and Tourism, available in January 1985. To obtain a copy, send $75.00 (prepaid only) to the U.S. Travel Data Center, 1899 L Street N.W., Suite 610, Washington, DC 20036. The publication will be sent to all Data Center members as a membership benefit. ##

DATA CENTER ANNOUNCES STAFF CHANGES

Nancy A. Mina has been promoted to manager of economic studies of the U.S. Travel Data Center, announced Dr. Douglas C. Frechtling, Data Center director.

For the last three years, Mina served as economic analyst for the Data Center. In her new position, she will be responsible for annual estimates of the economic impact of travel at the national, state and local levels.

Mina holds a bachelor's degree in business and economics from Guilford College in North Carolina, and is currently completing a master's degree in economics at American University in Washington, D.C.

Alfreda M. Cardwell joins the Data Center as research analyst, replacing Mina. Her responsibilities include analyzing the results of the Data Center's monthly National Travel Survey. Cardwell is a graduate of Virginia Commonwealth University, where she received both a bachelor's degree in marketing and an M.B.A. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	September	% Change from August, 1984	% Change from September, 1983	Year-to-date % change 1984/83
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	$ 2,929 million	2.1	14.6	14.7
Eating and drinking places(2)	$10,284 million	0.7	4.7	7.9
Gasoline service stations(2)	$ 8,696 million	- 3.6	0.2	4.5
Commercial lodging demand				
Hotel/motel occupancy rate(3)	N/A	N/A	N/A	N/A
Real demand for commercial lodging(4)	$ 1,036 million	2.4	6.7	6.5
Airline passenger traffic(5)				
Domestic revenue passenger-miles	17.6 billion	8.4	0.8	- 2.0
International revenue passenger-miles	5.7 billion	16.6	15.2	15.4
Bus passenger traffic(6)				
Intercity bus passenger-miles	2.6 billion	13.5	- 2.6	- 2.8
Highway traffic volume(7)				
Rural arterial vehicle-miles	41.6 billion	6.1	5.3	5.8
Rail passenger traffic(8)				
Amtrak passenger-miles	483.9 million	25.8	28.3	11.1
Travel Price Index(9)	364.1	0.2	4.2	4.8
U.S. resident travel(10)				
Total person-trips	116.5 million	45.4	- 0.6	- 4.4
Vacation person-trips	85.5 million	58.3	16.3	14.2
Public use of national parks(11)				
Visits	N/A	N/A	N/A	N/A
Overnight stays	N/A	N/A	N/A	N/A
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	794,541	- 7.7	- 6.6	- 0.3
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	1,420,411	74.6	- 0.4	0.04
Domestic demand for motor gasoline(13)				
Barrels per day	6,967 thousand	1.4	- 0.6	1.7

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

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